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**POWER TOOLS**  
*for Nonprofits*

**NOVEMBER 18, 2009**

RELIANT CENTER

ONE RELIANT PARK

HOUSTON, TEXAS

SPONSORED BY:



# 2009 POWER TOOLS

WEDNESDAY, NOVEMBER 18, 2009 • 7:45 AM - 4:00 PM • RELIANT CENTER

**C**enterPoint Energy is a proud sponsor of the Power Tools for Nonprofits Conference in partnership with the University of Houston – Continuing Education. Our Power Tools for Nonprofits' mission has remained the same since 1993: To provide an educational forum for nonprofit professionals, volunteers, and board members on ways to leverage resources, strengthen organizational effectiveness and improve the quality of life for all. Each year our Advisory Board works hard to find experts from various fields to share valuable knowledge, best practices, and ways to enhance organizations' performance.

The nonprofit sector continues to move forward despite the tough economic climate, thanks to the generous and unwavering support of many corporations, foundations and philanthropies in Texas. As we face the challenges of this recession, there is a greater need for the Power Tools for Nonprofits Conference to help sustain the viability of nonprofits as they fulfill their mission, provide better services, grow and build on past successes.

Mark your calendar, bring a friend and plan to attend the most renowned conference in Texas. The Power Tools for Nonprofits Conference will help sharpen your skills, discover new strategic ideas, gain new resources, expand your network, and embrace new opportunities for change in these challenging times.



## KEYNOTE SPEAKER

Carol Weisman, the president of Board Builders, works primarily in the US, Canada, the UK and Australia. She specializes in fundraising, philanthropy and governance, has served on 31 boards and has been president of seven.

Carol began her professional career working with street gangs. She found the gangs better organized, with clearer expectations and a solid leadership training program than most non-profits.

Carol is the author of nine books on fundraising, governance and philanthropy. Carol's most recent book, "Transforming Ordinary People into Fundraising Superheroes" is hot off the press. It is available at [www.fundraisingsuperheroes.com](http://www.fundraisingsuperheroes.com). Carol's book "Raising Charitable Children" is in its third printing. It has been featured in the New York Times, Parade Magazine and was the cover story for Scholastic Parent and Child Magazine.

Carol has won two Telly awards: The first for her five years at PBS satellite broadcast "Creating a Board With a Passion for Mission" and the other for her work with Hugh Downs in the video "Speaking of Money."

# CONFERENCE FEATURES

## TARGET AUDIENCE

Over the past 16 years CenterPoint Energy and the University of Houston have assisted many nonprofit organizations in Southeast Texas by providing a high quality educational forum at a nominal fee. Social service agencies, community and faith-based groups, business and professional associations, schools and other educational institutions are some of the diverse organizations that attend the Power Tools for Nonprofits Conference each year.

The Power Tools for Nonprofits Conference features twenty-eight cutting edge topics, well-known presenters and a keynote speaker. We offer valuable learning opportunities for executive directors, funding directors, leaders, staff members, board members and volunteers. Popular tracks include Best Management Practices/Human Resources, Fund Development, Leadership, Marketing/Public Relations, Organizational Effectiveness and Career Development.

## THE SURVEY SAYS...

In the annual Power Tools Survey, the majority of our participants expressed that they have increased their productivity, energy, enthusiasm and dedication to serving their clients. In our overall survey, 98 percent stated that they would return to the Power Tools for Nonprofits and 99.6 percent would recommend our conference to others. Here are three inspiring quotes from previous participants:

*"Each fall I make certain to attend Power Tools for Nonprofits Conference and "profit" from the experience. On arrival the atmosphere promotes networking and a readiness for learning. Presenters are well selected, exceptionally knowledgeable, and energetic in keeping their audiences attentive. Handouts summarize expertise presented, often valuable for future reference."* – Helene Harvey, Licensed Clinical Social Worker

*"In one single day, the Power Tools Conference managed to provide me with practical information that helped me get funding for my organization, networking opportunities with local nonprofit contacts and inspiration to do even more to serve the needs of our communities."* – Linda Stevens, Harris County Public Library

*"I truly look forward to attending the Power Tools conference each fall season. The instructors have a wealth of expertise in their subject areas, the classes provide invaluable training that is useful in everyday workplace applications, and the keynote speaker is always inspiring. The Power Tools Conference is not to be missed and is certainly the place to be!"* – Marshall Levit, Jewish Community Center Board Member

# CONFERENCE SCHEDULE



7:45 AM	Registration
8:30 - 8:45 AM	Refreshments/Networking/Resource Center
8:45 - 10:00 AM	Concurrent Sessions
10:00 - 10:15 AM	Networking/Resource Center
10:15 - 11:30 AM	Concurrent Sessions
11:45 - 1:00 PM	Luncheon/Keynote Speaker/Carol Weisman
1:00 - 1:15 PM	Networking/Resource Center
1:15 - 2:30 PM	Concurrent Sessions
2:30 - 2:45 PM	Refreshments/Networking/Resource Center
2:45 - 4:00 PM	Concurrent Sessions
4:00 PM	Adjournment

# CONCURRENT SESSIONS

**8:45-10:00 AM**

**2 Show Me the Money: Tax Laws that Impact You**

*Elizabeth Colvin, Neighborhood Centers Inc.*

Learn about new tax credits, including Making Work Pay, the Homebuyer Credit, and big changes to the Earned Income Credit. Discover what will impact your tax return in 2010 and what does not make a difference. Taxes are one of the two certainties in life, so learn how taxes impact you!

**2 Mind Mapping: Interactive Brainstorming on Steroids**

*Ward Pennebaker, Pennebaker Fifth Ring*

Brainstorming and note taking are never linear. Mind mapping is a proven technique for quickly and efficiently capturing information in a manner that parallels how we think. You will learn tips, tricks and real world examples that will help you in all areas of your job.

**1 Blueprint for Success**

*Garcie Cavnar, Recipe for Success Foundation*

Often organizations become so entangled in the challenges of day-to-day operations—satisfying the mission, fundraising, functional support—that it is easy to wander off course. A thoughtful well-crafted long-range plan is the beacon that ensures successful navigation through the immediate.

**2 Aligning Talent and Succession Management**

*Cathryn Gabor, Executive Service Corps of Houston - Volunteer Consultant, HR Practice*

Explore the corporate organization and talent review process, and build a common vocabulary and practices around succession. Learn how to align succession to performance management and the processes to build a dialogue around succession. Discover what senior leaders need to do to keep the conversation alive.

**1 Tips and Tricks for the Aspiring Nonprofit Professional**

*Ronnie Hagerty, United Way of Greater Houston*

*Gayla Rawlinson, Harris County Department of Education*

There are dozens of unwritten rules that can help or hinder your upward mobility in the nonprofit sector. This session will address everything from the interview process to dress codes and relationship-building. Discover how to navigate the awkward terrain of salary inquiries, supervisory issues, leave requests and similar uncomfortable conversations. Get the answers to those questions you have been afraid to ask.

**1 Opening Doors: Strategies for a Successful First Prospect Visit**

*Edward Benyon, Executive Service Corps of Houston*

We know the clichés: “If you want advice, ask for money. If you want money, ask for advice,” or “It’s not a fundraising, it’s a friend-raising!” There are elements of truth to be found in each. Learn how every member of the fundraising team, from development professionals to board members to program volunteers, can carry out successful introductory meetings with prospective donors to open doors to new resources.

**2 Using Gift Planning to Maximize Your Gifts**

*Shirley Druggan, UT Health Science Center*

With the ongoing impact of the recession, there is usually a drop in foundations and personal assets. Learn how a planned gift can increase a major gift, how to match planned gifts to donors, and initiate a planned gift discussion. Discover how to improve your overall fundraising performance.

**10:15-11:30 AM**

**1 Write it Right**

*Joe Bontke, Equal Employment Opportunity Commission*

Why is written documentation so important? When should it be prepared? Who should write it? Is it appropriate or smart to leave electronic footprints of your thoughts, suggestions and comments about employees? Learn about preventing calamity based on cyber speech.

**2 The Power Press Conference**

*Katherine Cabaniss, Crime Stoppers*

You can organize and manage the perfect press conference. How can you work in partnership with the media, insure that your message is heard and your organization is expertly showcased? Learn the do’s and don’ts of print, televised and web coverage. Start publicizing your worthy cause today!

**1 Organize Your Office in Six Simple Steps**

*Holly Uverity, Office Organizers*

Learn six simple steps to organizing your office and keep it that way. We will discuss why clutter accumulates, how to make decisions about your “stuff”, methods to keep your desk clear and how to keep track of your current projects.

# CONCURRENT SESSIONS

**10:15-11:30 AM** *(continued)*

## ③ Making A Good Board GREAT

*Marilyn Brown, Leadership Houston*

Times are changing – is your board keeping up? Learn how to examine your board's structure and make the changes necessary in order to meet the current and future challenges you may face.

## ① Coaching Programs to SHIFT Your RESULTS

*Patty Walter, I-Shift Now*

Keep your audience awake and engaged. Learn how to use PowerPoint effectively to make your PowerPoint come alive with presentation skills that really work. Say what is in your heart and create interactive and impactful presentations.

## ② Make Special Events Special

*Julie Bergen, Discovery Green Conservancy*

Stressed about planning an event? Learn the basics for a successful special event – large or small.

## ② Optimizing Efforts in a Down Economy

*Rebecca Yanez, AndrisinAbbey*

Despite the current economic climate most donors continue to express a deep commitment to philanthropy. Put critical measures in place to maintain essential funding. Gain confidence in uncertain times and lead your organization to understanding the current economic impact on philanthropic giving, implementing immediate practical steps, and preparing for long-term giving challenges.

**1:15-2:30 PM**

## ① Performance Management Basics

*Wendy Johnson, United Way of Greater Houston*

An effective performance management system enables a high performance organization. Explore the components and tools to create a successful system for your organization.

## ① Creating a Competitive Advantage

*Ed Morrett, Executive Service Corps of Houston*

This session will define a process that can help a small-to-medium size nonprofit differentiate itself from others serving a common client base.

## ① Who Are the Generations at Work?

*Karen White, United Way of Greater Houston*

Today, four generations are working side by side, "Traditionalists, Baby Boomers, Gen Xers and Millennials - who are we and why are we making the workplace so challenging? Join us as we explore who we are and our respective talents.

## ① Mentoring Employees: Keeping the Right Employees on Your Team

*Mazie Leftwich, Contract Land Staff LLC*

Are you doing all you can to help your employees grow professionally and be better prepared for their future role as well as getting them to do what you want them to do now? Compare supervision, coaching and mentoring, and recognize how you deal with your employees. Learn the secrets of creating and keeping a great work team together!

## ① Addressing the Dynamic Profile of Today's Student

*Bernadette Drayden, University of Phoenix*

*Cheryl Sterling, Houston Community College System*

This workshop will focus on building a network of services (including on-line assistance) that can be provided in the college environment to ensure that students reach their optimal educational goals. Topics include: the role of academic counselors and the efficient utilization of the resources in the nonprofit and business community, trends, upgrading skills and hottest jobs.

## ② Ask Major Questions Before Asking for a Major Gift

*Susan Martz, Rice University*

Learn the connection between altitude, attitude and the context in developing and securing a successful major gift ask. Identify strategies to maximize your investor relationships with key prospects.

## ① Seeking Grants from Private Foundations

*Matthew Barnes, Houston Endowment Inc.*

*Joanie Haley, The Robert and Janice McNair Foundation*

*Dee Koch, The George Foundation*

Come hear from the experts – experienced staff members at local private foundations will share their guidance and insights to help YOU be successful in obtaining grants.

# CONCURRENT SESSIONS

2:45-4:00 PM

## 1 Coaching for Results

*Neena Newberry, Newberry Executive Coaching & Consulting*

This interactive session will focus on building coaching skills that can be used to coach new and existing employees. Participants will have the opportunity to work on real life situations and use a model to help them effectively give developmental feedback.

## 1 So We Have a Crisis: Let's Get Down to Basics

*Toby Stark, AIDS Foundation Houston*

Every crisis and potential crisis has its own DNA, but there are some basic first steps that can and should be taken to keep any situation from escalating and creating even more damage.

## 1 How to Develop and Utilize Volunteers

*Walter Black, Volunteer Houston*

*Karen Holloman, Christian Community Service Center*

Nonprofit leaders quickly learn that BOTH volunteer recruitment techniques and volunteer retention strategies are essential to a program that successfully engages community members. This workshop will provide practical tools for recruiting volunteers and keeping them engaged.

## 1 Leadership Strategies in Challenging Times

*Angela Blanchard, Neighborhood Centers Inc.*

After surviving Katrina, Rita, Ike and a financial meltdown, nonprofit leaders face a new landscape. Participate in a conversation on the tools and strategies leaders need to survive – and flourish – in challenging times.

## 2 Adding Social Media into the Mix

*Jennifer Texada, MD Anderson Cancer Center*

Social media has created a shift in how people discover, read and share news. Hear about the impact that participating in social media can have on customer interaction. We will discuss the current social media channels, their impact and how you might approach adding social media into your marketing/communication plan.

## 1 Best Practices in Annual Giving

*Chris Kasavich, Baylor College of Medicine*

What is a great Annual Fund...and how do I get there? This session will cover the basics of an Annual Fund program, the role of the Annual Fund in a fundraising shop, common program elements, and the basics for each element.

## 1 Tips for Successfully Cultivating Corporate Gifts

*Joni Baird, Chevron Corporation*

*Dan D'Armond, BMC Software*

*Pam Lovett, Sterling Bank*

Discover what companies are seeking as they evaluate requests from nonprofit organizations. Learn what is expected of a nonprofit making grant requests.

## RESOURCE CENTER

Please visit our vendors in the resource center located across from the registration area. Network and learn about exciting information, services and materials offered. For more information or to request an exhibitor packet, please call 713-743-1181.

### PLEASE NOTE:

***All handouts will be on line. Please download your handouts of the sessions you want to attend before attending the conference. No handouts will be available at the conference. Access your handouts at: [www.uh.edu/continuingeducation/special/nonprofit.php](http://www.uh.edu/continuingeducation/special/nonprofit.php)***

# CONCURRENT SESSIONS TIMETABLE

	<b>Best Mgt. Pract./HR</b> Room 202	<b>Marketing/Public Relations</b> Room 203	<b>Organizational Effectiveness</b> Room 204	<b>Leadership</b> Room 205
<b>7:45 AM</b>	<b>CONFERENCE REGISTRATION</b>			
<b>8:30 – 8:45 AM</b>	<b>Refreshments/Networking/Resource Center</b>			
<b>8:45 – 10:00 AM</b>	<p>Show Me the Money: Tax Laws That Impact You</p> <p><i>Elizabeth Colvin</i></p> <p style="text-align: center;">②</p>	<p>Mind Mapping: Interactive Brainstorming on Steroids</p> <p><i>Ward Pennebaker</i></p> <p style="text-align: center;">②</p>	<p>Blueprint for Success</p> <p><i>Gracie Cawnar</i></p> <p style="text-align: center;">①</p>	<p>Aligning Talent and Succession Management</p> <p><i>Cathryn Gabor</i></p> <p style="text-align: center;">③</p>
<b>10:15 – 11:30 AM</b>	<p>Write it Right</p> <p><i>Joe Bontke</i></p> <p style="text-align: center;">①</p>	<p>The Power Press Conference</p> <p><i>Katherine Cabaniss</i></p> <p style="text-align: center;">②</p>	<p>Organize Your Office in Six Simple Steps</p> <p><i>Holly Uverity</i></p> <p style="text-align: center;">①</p>	<p>Making a Good Board GREAT</p> <p><i>Marilyn Brown</i></p> <p style="text-align: center;">③</p>
<b>11:45 – 1:00 PM</b>	<b>Luncheon – Keynote Speaker: CAROL WEISMAN</b>			
<b>1:15 – 2:30 PM</b>	<p>Performance Management Basics</p> <p><i>Wendy Johnson</i></p> <p style="text-align: center;">①</p>	<p>Creating a Competitive Advantage</p> <p><i>Ed Morrett</i></p> <p style="text-align: center;">①</p>	<p>Who are the Generations at Work?</p> <p><i>Karen White</i></p> <p style="text-align: center;">①</p>	<p>Mentoring Employees: Keeping the Right Employees on Your Team</p> <p><i>Mazie Leftwich</i></p> <p style="text-align: center;">①</p>
<b>2:45 – 4:00 PM</b>	<p>Coaching for Results</p> <p><i>Neena Neuberry</i></p> <p style="text-align: center;">①</p>	<p>So We Have a Crisis; Let's Get Down to Basics</p> <p><i>Toby Stark</i></p> <p style="text-align: center;">①</p>	<p>How to Develop and Utilize Volunteers</p> <p><i>Walter Black</i> <i>Karen Holloman</i></p> <p style="text-align: center;">①</p>	<p>Leadership Strategies in Challenging Times</p> <p><i>Angela Blanchard</i></p> <p style="text-align: center;">②</p>

① General      ② Intermediate Level      ③ Advanced Level

# CONCURRENT SESSIONS TIMETABLE

	<b>Career Development</b> Room 206	<b>Fund Development</b> Room 305	<b>Fund Development</b> Room 306
7:45 AM	<b>CONFERENCE REGISTRATION</b>		
8:30 – 8:45 AM	<b>Refreshments/Networking/Resource Center</b>		
8:45 – 10:00 AM	<p>Tips &amp; Tricks for the Aspiring Nonprofit Professional</p> <p><i>Ronnie Hagerty &amp; Gayla Rawlinson</i></p> <p style="text-align: center;">①</p>	<p>Opening Doors: Strategies for a Successful First Prospect Visit</p> <p style="text-align: center;"><i>Edward Benyon</i></p> <p style="text-align: center;">①</p>	<p>Using Gift Planning to Maximize Your Gifts</p> <p style="text-align: center;"><i>Shirley Druggan</i></p> <p style="text-align: center;">②</p>
10:15 – 11:30 AM	<p>Coaching Programs to SHIFT Your RESULTS</p> <p style="text-align: center;"><i>Patty Walters</i></p> <p style="text-align: center;">①</p>	<p>Make Special Events Special</p> <p style="text-align: center;"><i>Julie Bergen</i></p> <p style="text-align: center;">②</p>	<p>Optimizing Efforts in a Down Economy</p> <p style="text-align: center;"><i>Rebecca Yanez</i></p> <p style="text-align: center;">②</p>
11:40 – 1:00 PM	<b>Luncheon – Keynote Speaker:</b> <b>CAROL WEISMAN</b>		
1:15 – 2:30 PM	<p>Addressing the Dynamic Profile of Today's Student</p> <p><i>Bernadette Drayden &amp; Cheryl Sterling</i></p> <p style="text-align: center;">①</p>	<p>Ask Major Questions Before Asking for Major Gifts</p> <p style="text-align: center;"><i>Susan Martz</i></p> <p style="text-align: center;">②</p>	<p>Seeking Grants from Private Foundations</p> <p><i>Matthew Barnes, Joanie Haley, Dee Koch</i></p> <p style="text-align: center;">①</p>
2:45 – 4:00 PM	<p>Adding Social Media into the Mix</p> <p style="text-align: center;"><i>Jennifer Texada</i></p> <p style="text-align: center;">②</p>	<p>Best Practices in Annual Giving</p> <p style="text-align: center;"><i>Chris Kasavich</i></p> <p style="text-align: center;">①</p>	<p>Tips for Successfully Cultivating Corporate Gifts</p> <p><i>Joni Baird, Dan D'Armond, Pam Lovett</i></p> <p style="text-align: center;">①</p>

① General      ② Intermediate Level      ③ Advanced Level

## CONFERENCE ADVISORY BOARD & ORGANIZERS

### CONFERENCE ADVISORY BOARD

**Jennifer Anderson**, Junior Achievement of Southeast Texas

**Nine-Min Cheng**, Chinese Community Center

**Juanita Elizondo**, Fiesta Mart

**Nick Espinosa**, The Houston Zoo

**Elliot Gershenson**, Interfaith Ministries

**Ronnie Hagerty**, United Way of Greater Houston

**Joanie Haley**, The Robert & Janice McNair Foundation

**Jane Harding**, Executive Service Corps of Houston

**Ronald Jackson**, The Awty International School

**Mazie Leftwich**, Contract Land Staff, LLC

**Gayla Rawlinson**, Harris County Department of Education

**Monica Rhodes**, Elmore Public Relations

**David Ruiz**, Bank of America

**Robert Sanborn**, Children at Risk

**Michelle Shonbeck**, Christian Community Service Center

**Toyi Vaughan**, Neighborhood Centers Inc.

**Jerome Vielman**, Houston Arts Alliance

**Harriet Wasserstrum**, American Leadership/Forum

For Houston/Gulf Coast

### CONFERENCE ORGANIZERS

**MaryLynn Kallina Matthews**,

CenterPoint Energy

**Gloria A. Luna**, CenterPoint Energy

**Beverly McLendon**, UH Continuing Education

**Bette Range**, UH Continuing Education

To register by phone using MasterCard,

Visa or American Express,

call 713-743-1060

or fax registration form to 713-743-1203.

Online registration available at

[www.uh.edu/continuingeducation/special/nonprofit.php](http://www.uh.edu/continuingeducation/special/nonprofit.php)

# POWER TOOLS REGISTRATION

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To register by phone using Visa, MasterCard or American Express, call 713-743-1060 or fax the form with credit card information to 713-743-1203. To register online – [www.uh.edu/continuingeducation/special/nonprofit.php](http://www.uh.edu/continuingeducation/special/nonprofit.php).

I prefer a vegetarian lunch     I prefer a vegan lunch

Name	Driver's	License No. (if paying by check)		
Address	City	State	ZIP	
Phone (day)	(evening)	E-mail Address	(Fax)	Organization Name

Registration by **November 6, 2009** (includes lunch and refreshments)  \$49

Register five or more people from the same organization  \$45 each

*(Discount only applies if all registrations are received at the same time, with one payment.)*

Registration **after November 6, 2009 or at the door** (includes lunch and refreshments)  \$75



**Conference Materials:** CD will be provided at registration. All speaker presentations will be on the CD.

**NO HANDOUTS WILL BE PROVIDED AT CONFERENCE.**

Handouts are available on line at: [www.uh.edu/continuingeducation/special/nonprofit.php](http://www.uh.edu/continuingeducation/special/nonprofit.php)

Mail this form with a check payable to University of Houston (UH Federal ID No. 74-600-1399W):

University of Houston  
Continuing Education  
102 C. N. Hilton & Conference Center  
Houston, TX 77204-3027

**Fax with Visa, MasterCard or American Express number to 713-743-1203.**

**To register by phone using a credit card, call 713-743-1060.**     Visa     MasterCard     American Express

Name on Card	Authorized	Signature
Credit Card Number	Expiration	Date

## RELIANT PARKING: \$8 CASH ONLY

Reliant Center is located at Reliant Park.

**Enter on McNee St. off of Kirby. Follow directional signs for Power Tools for Nonprofits Conference parking in the Orange Lot.**

*The University of Houston is an affirmative action/equal opportunity institution. Persons with disabilities requiring special accommodations may call 713-743-1060. Special accommodation requests must be received by October 15, 2009.*

## ACCOMMODATIONS:

**Special rates available at the following hotels in the Reliant Park/Medical Center area. Please indicate you are attending the Power Tools for Nonprofits Conference.**

Mariott Spring Hill Suites, 713-796-1000  
Holiday Inn, 713-790-1900

00730-H0013-A1188-NA  
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Continuing Education  
102 C. N. Hilton & Conference Center  
Houston TX 77204-3027

16TH ANNUAL  
**POWER TOOLS**  
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AWARD WINNING CONFERENCE

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